Chapter 2
Administering Training

Chapter Overview

Introduction

This chapter guides you through the processes of administering training, to include the Civilian Inbox, Activities, Events, and creating Local Suppliers.

Chapter Contents

Continued on next page

Chapter Overview, Continued

See Also

Module 1, Fundamentals of the Modern DCPDS
Chapter 7, Folders
Module 7, Employee Training and Development Using the Modern DCPDS
Chapter 1, Requesting Training
Section: Completing the Training Request Form

Processing OTA Actions in the Civilian Inbox

Purpose

This procedure guides you through the steps for accessing and processing OTA actions in the Civilian Inbox.

Definition

The **Civilian Inbox** displays notifications of actions initiated by you or routed to you. Everyone who has an inbox (e.g., supervisor, Training Official, Authorizing Official, training monitors, training managers, and personnelists) can process training actions.

As Training Requests are submitted, they will be forwarded to the appropriate **Civilian Inbox** to await further action.

See Also

Module 1, Fundamentals of the Modern DCPDS
- Chapter 7, Folders
- Chapter 9, Civilian Inbox

Module 7, Employee Training and Development
- Chapter 2, Administering Training
  - Sections:
    - Defining an Activity
    - Scheduling an Event
    - Creating a Local Supplier for a Local Activity
- Chapter 4, Training Completions and Evaluation:
  - Section: Managing Completions and Evaluations

Who Can Access the Civilian Inbox

Managers/supervisors, personnelists and any others in the organization assigned to a **Civilian Inbox** with OTA responsibility.

Continued on next page

Processing OTA Actions in the Civilian Inbox, Continued

Before You Begin

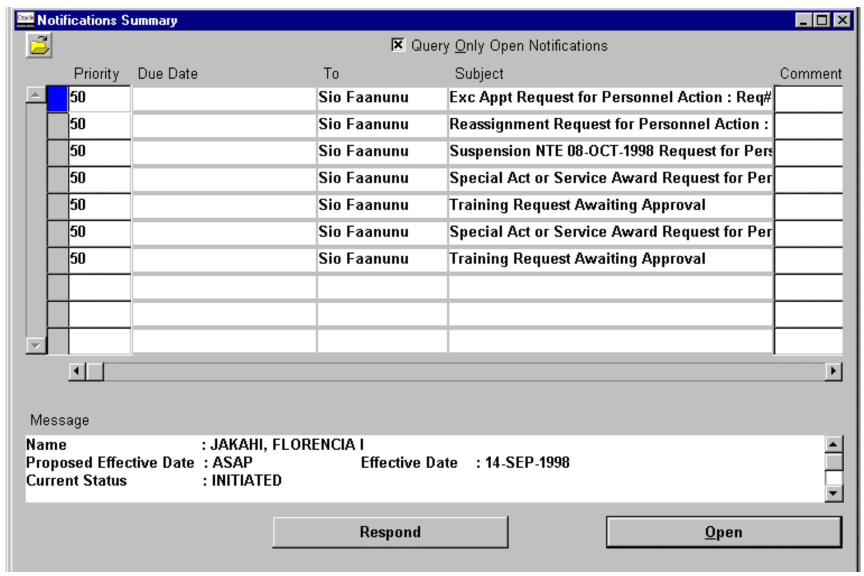
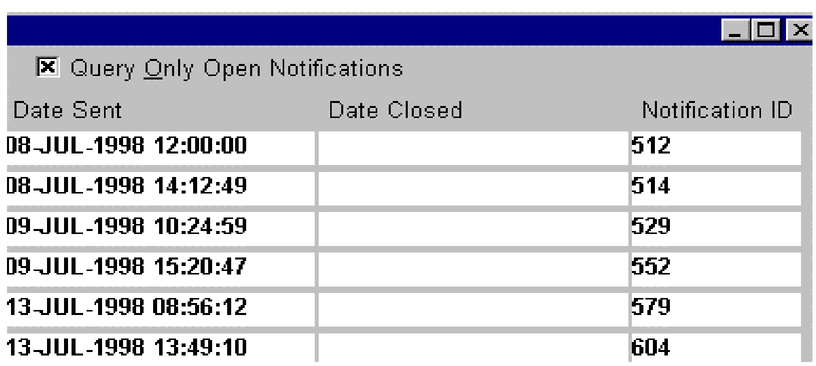
- Before a Training Request action will display in your **Civilian Inbox**, a completed Training Request Form (**TRF)** must have been completed and forwarded by an employee, manager/supervisor, or training monitor to you.
- The **TRF** automatically populates part of the DD Form 1556. You must complete the TRF if you want to print a complete DD Form 1556.
- The OTA and Oracle HR Inboxes are different views of the same Inbox. You can see **TRFs** from either Inbox; however, you must access the OTA Inbox through a trainer role (administrator, manager, or OTA personnelist) before you can process actions. If you are in Oracle HR and try to process a **TRF**, you will get an error message.

Note: The **TRF** can be printed by the initiator and at each approval level.

Continued on next page

Processing OTA Actions in the Civilian Inbox, Continued

Accessing the Civilian Inbox

Step	Action
1	From the **Navigation List** → *Civilian Inbox* → <**Open**>.
2	Click F8 to query the **Notifications Summary** Window. All actions (training and otherwise) sent to you that relate to your user roles and responsibilities display.  Use the bottom scroll bar to review remaining columns. 

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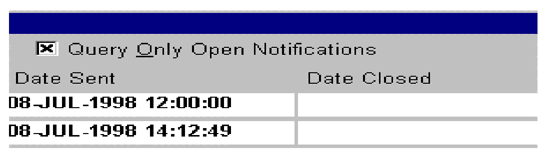
Processing OTA Actions in the Civilian Inbox, Continued

Data Fields

The data fields of the **Notifications Summary** Window are explained below.

Data Fields/Buttons	Description/Action
Priority	System generated number (not the DoD course priority).
Due Date	Not applicable to the OTA actions.
To	Auto-populates.
Subject	Auto-populates.
Comment	Additional information on the request may be added in this 2000-character field.
Date Sent	Auto-populates.
Date Closed	Auto-populates when action is complete; however, it will not be visible until you deselect the Query Only Open Notifications Checkbox.
Notification ID	System generated number.
Status	Initialized with "Open."
	Note: The **Query Only Open Notifications** checkbox is selected by default, so that only open actions display. Deselect the checkbox to turn off this option, and use it when you need to query closed actions for historical data. 
Attributes 1-20	Additional columns for local use.
Message Block	Gives brief details of the action to be worked.
Open Button	Click to view the expanded message.
Close Button	Click to close the action.

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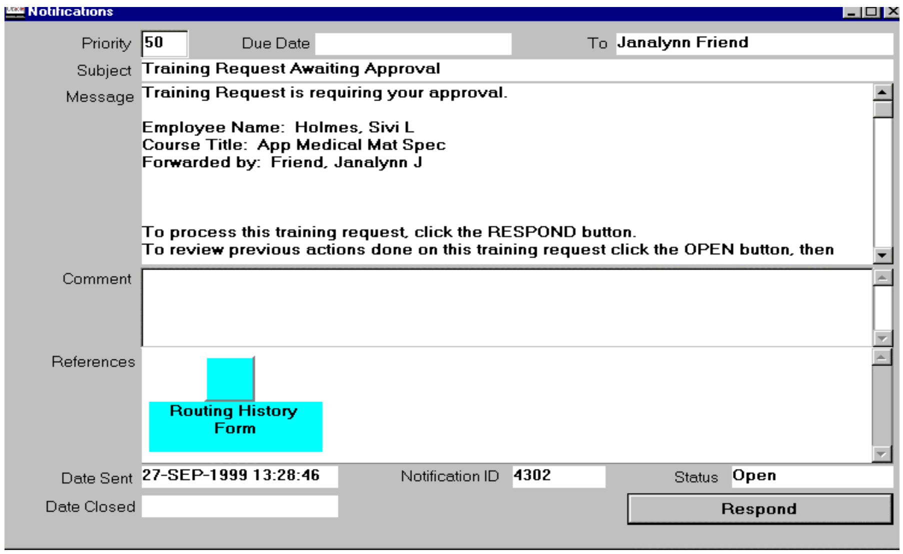
Processing OTA Actions in the Civilian Inbox, Continued

Accessing the Notifications Window

Step	Action
1	Click **<Open>** on the **Notifications Summary** Window to display the **Notifications** Window. 
2	From the **Notifications** Window, you can process the **TRF** action by clicking **<Respond>** and displaying the TRF, or view the history of the **TRF** by clicking the **Routing History Form** Icon.

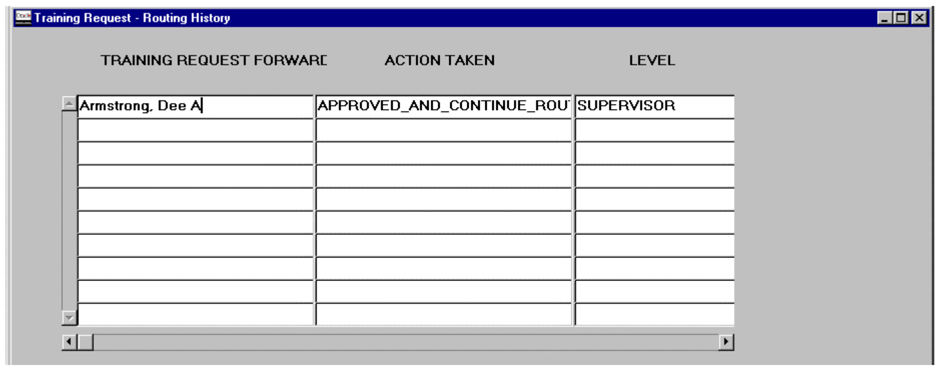
Data Fields on the Notifications Window

Data Fields and Buttons	Description/Action
Comment	You can add additional information in this data field. However, it stays with the request and does not go into history.
References	Displays the **Routing History Form** Icon to track the history of the request being processed.
Respond Taskflow Button	Displays the TRF.

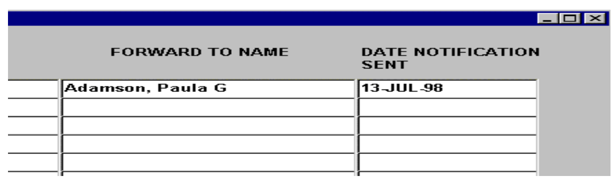
TRF Routing History

Training Request Form – Routing History

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Routing History Form Icon.</td></tr>
<tr><td>2</td><td>The Training Request – Routing History Window displays.



Use the lower scroll bar to view remaining columns

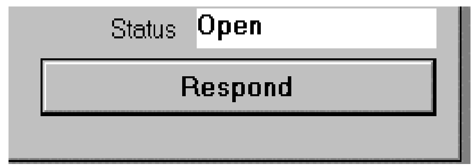
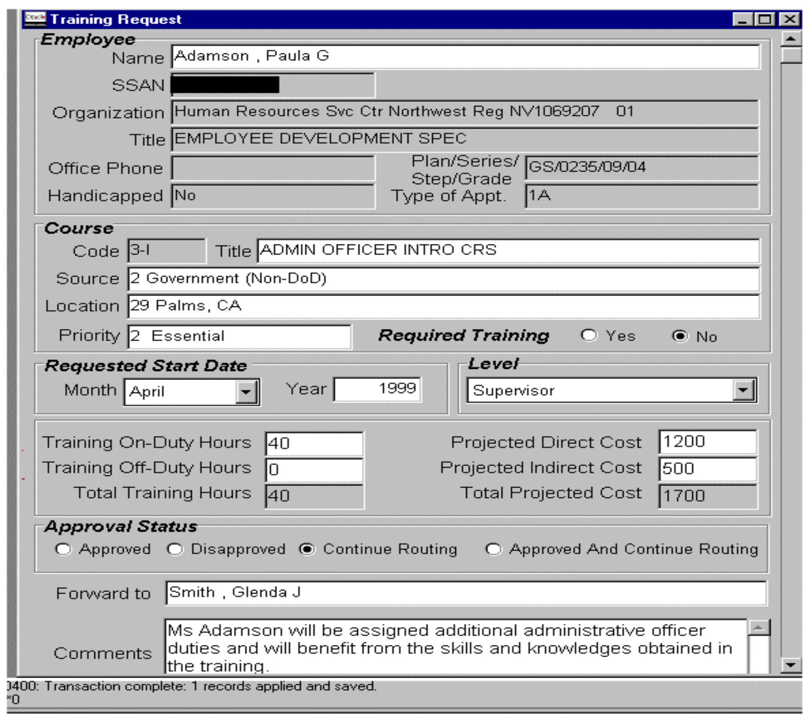


<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Training Request Forwarded By</td><td>Name of Supervisor, Training Monitor, etc., who forwarded the TRF.</td></tr>
<tr><td>Action Taken</td><td>Self-explanatory – matches Approval Status Region of the TRF.</td></tr>
<tr><td>Level</td><td>Of person who submitted the TRF.</td></tr>
<tr><td>Forward to Name</td><td>The next person designated to take action.</td></tr>
<tr><td>Date Notification Sent</td><td>Self-explanatory.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

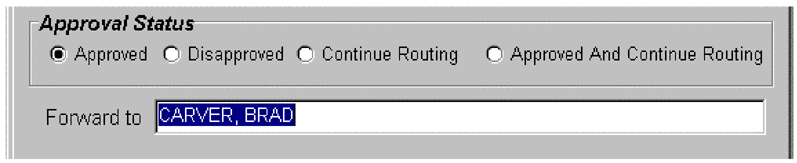
TRF Routing History, Continued

Training Request Form – Routing History (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Once you have reviewed the columns, exit the window to return to the Notifications Window.</td></tr>
<tr><td>4</td><td>Click <Respond> on the Notifications Window.

</td></tr>
<tr><td>5</td><td>The TRF displays. Take action as needed to Approve, Disapprove, or Continue Routing.

</td></tr>
</table>

Approving or Disapproving the TRF

Approving or Disapproving the TRF

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the appropriate button, as determined by your role, in the Approval Status Region of the TRF.


Note: See information on Approval Status in Chapter 1 of this module.</td></tr>
<tr><td>2</td><td><table>
<tr><td>If you <u>are</u> the approving official:</td><td>If you are <u>not</u> the final approving official:</td></tr>
<tr><td>• Click <Approved> or <Disapproved>.</td><td>• Click <Continue Routing> or <Approved and Continue Routing>.</td></tr>
<tr><td>• Click the Save button on the Toolbar.</td><td>• Use the LOV to select the name to enter in the Forward to data field or type in the name.
• Click the Save button on the Toolbar.</td></tr>
</table>
Note: If you disapprove the request, you will not complete the next step.</td></tr>
<tr><td>3</td><td>Determine the next action to perform (Build a Supplier, Define an Activity, Build an Event, Enroll the Employee) and exit the windows.</td></tr>
</table>

Customizing Your Civilian Inbox

Customizing Your Inbox

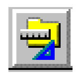
Use the **Folder Menu** and the **Folder Tools Palette** on the Toolbar to customize folders in your inbox for your use.

See Also

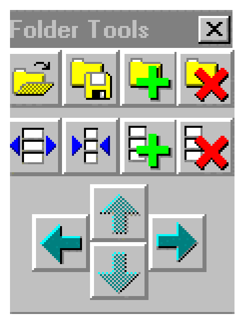
Module 1, Fundamentals of the Modern DCPDS
Chapter 7, Folders

Folder Tools Palette

For many of the **Folder** menu items, there is a corresponding button on the **Folder Tools Palette**, which performs the same function.

Click the **Folder Tools** button  on the Toolbar, which becomes enabled when you navigate to a folder block.

The **Folder Tools Palette** displays:



Customizing Data in a Folder

You can customize the display layout using the **Folder** menu and **Folder Tools**. You can:

- Display only those data fields of interest to you.
- Instantly modify the column width, sequence, and labels of the data fields you want to display.
- Save your folder customizations for future use.
- Keep your folder customizations private or make them public for others to access.
- Make your customizations the default display for a folder.

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Customizing Your Civilian Inbox, Continued

Changing the Column Headings

You can change the data field labels (column headings) in a folder. This will not change the data field name in the database; it will simply change the label used in the folder's information display. You may find this feature helpful in making reports more understandable, if you choose to print or export folder data.

Creating a New Folder Definition

You can create and maintain a number of different folder definitions, based on unique variations in query criteria and display formats. For example, you could create a folder for Training that displays TRFs and another folder to display RPAs. There are two basic ways to create a **new** folder definition:

1. Create a new folder, customize it, then save it.

   Or

2. Customize an existing folder and then perform the "Save As" function.

Both procedures will maintain the existing folder and create a new folder with your customizations.

Creating a Local Supplier for a Local Activity

Purpose

This procedure will guide you through the steps for creating a local supplier (vendor) for a local Activity.

Before You Begin

You must create a local supplier before you can set up a local Activity (course), if the supplier is not in the DoD Course Catalog.

Who Does This

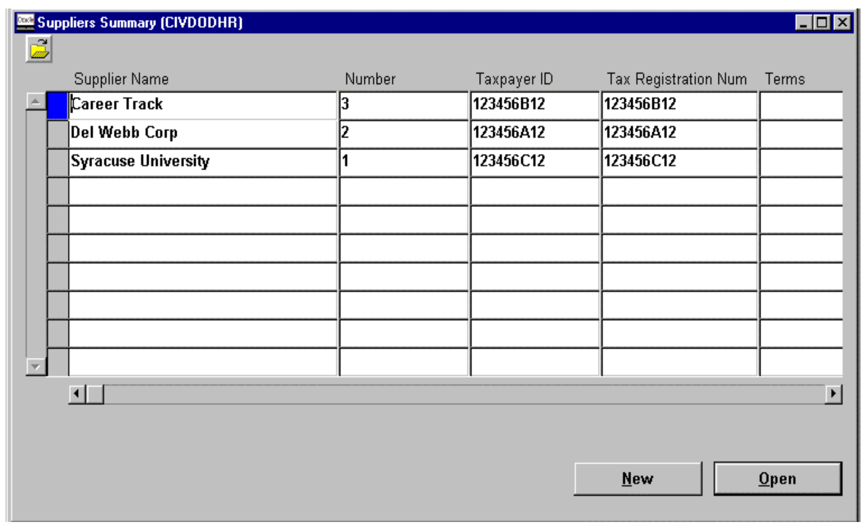
Components will determine who has the responsibility.

Continued on next page

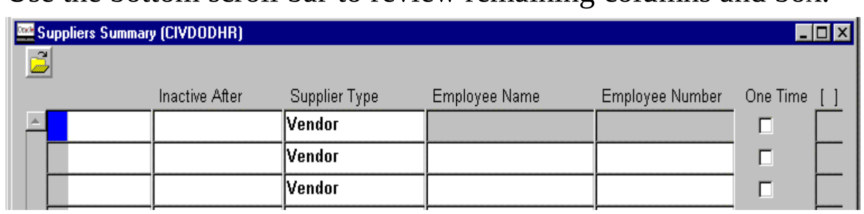
Creating a Local Supplier for a Local Activity, Continued

Accessing the Suppliers Summary Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Navigation List → Organizations → Supplier → <Open>.</td></tr>
<tr><td>2</td><td>The Suppliers Summary Window displays with nine columns, a One Time checkbox, an inactive DDF, and two taskflow buttons.
Query the existing Supplier list by clicking Query and clicking Run or pressing [F8].



Use the bottom scroll bar to review remaining columns and box.



</td></tr>
</table>

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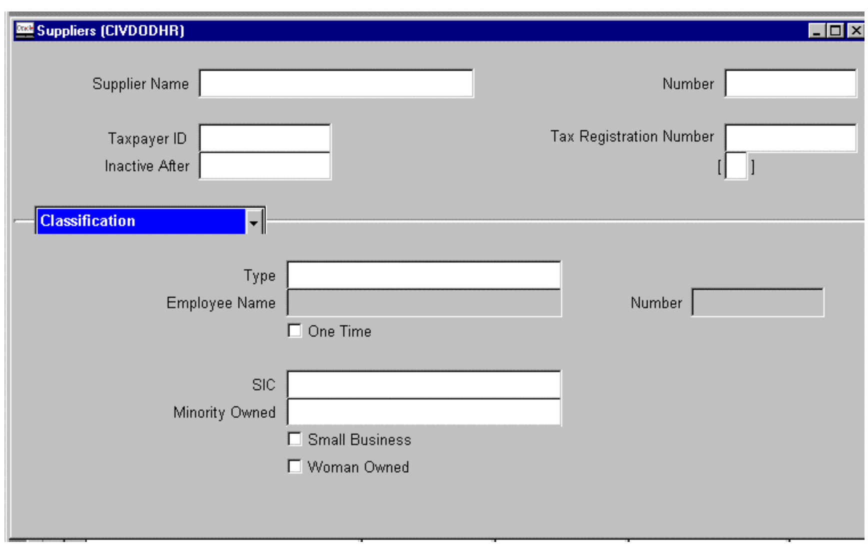
Creating a Local Supplier for a Local Activity, Continued

Accessing the Suppliers Summary Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>If the Supplier you need…</td></tr>
<tr><td></td><td>
<table>
<tr><td>Is listed, click <Open>.</td><td>Is not listed, click <New>.</td></tr>
<tr><td>
• The Suppliers Window opens with the name of the Supplier populating in the Supplier name field.
• Review information to ensure accuracy.
• Exit the window and move to the next process, Defining an Activity.
</td><td>
• The cursor drops down to the next empty line.
• Type the name of the new supplier (up to 80 characters).
• Do not type in the remaining columns.
• Click <Open>.
</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>The Suppliers Window displays. The window has a Supplier Name Region, a drop-down Classification menu with 12 choices (only Classification and Sites are used by DoD), a Type data field, and two checkboxes. Complete the data fields as indicated.


</td></tr>
</table>

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Creating a Local Supplier for a Local Activity, Continued

Completing the Suppliers Window

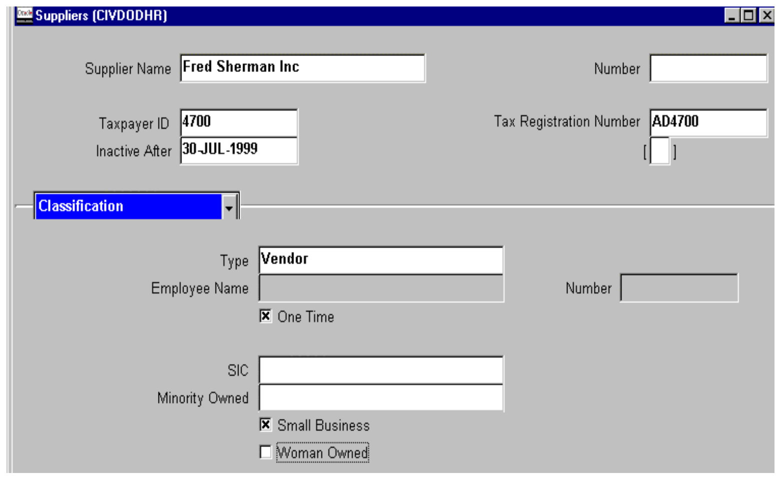
Step	Action
1	Place the cursor in the ***Supplier Name*** data field to enter the following data:

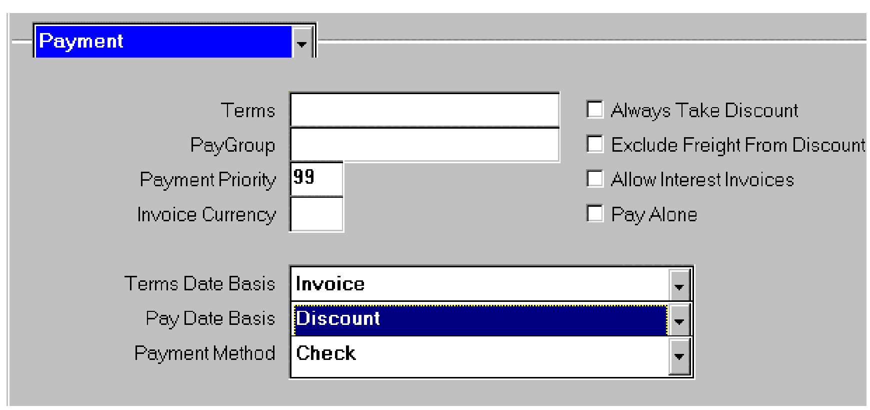
Data Field	Action
Supplier Name	Auto-populates.
Taxpayer ID	Type in number (not required).
Inactive After	Defaults to current date. Type in new date, if appropriate.
Number	System generated.
Tax Registration Number	Type in number (not required).
[ ]	Not customized for DoD.
Type	Click the LOV and select vendor.
Employee Name	Not active (not required).
Number	Not active (not required).
One-Time Checkbox	Click checkbox if the supplier is being used one time (not required).
SIC	Standard Industry Code (not required).
Minority Owned	Self-explanatory (not required).
Small Business Checkbox	Click checkbox (not required)
Woman Owned Checkbox	Click checkbox (not required)

Continued on next page

Creating a Local Supplier for a Local Activity, Continued

Completing the Suppliers Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1 (cont)</td><td>Example of a completed Suppliers Window before using the Classification drop-down menu to complete the Sites Region:


</td></tr>
<tr><td>2</td><td>Click the Classification drop-down menu and select Payment.</td></tr>
<tr><td>3</td><td>The lower half of the Suppliers Window displays the drop-down menu Payment, with seven data fields and four checkboxes. The first four data fields (Terms, PayGroup, Payment Priority, and Invoice Currency) are optional. The Terms Date Basis data field is a required Oracle field and must be entered. Once you click the drop-down menu to make a selection (e.g., Current), select Sites from the drop down menu.


</td></tr>
</table>

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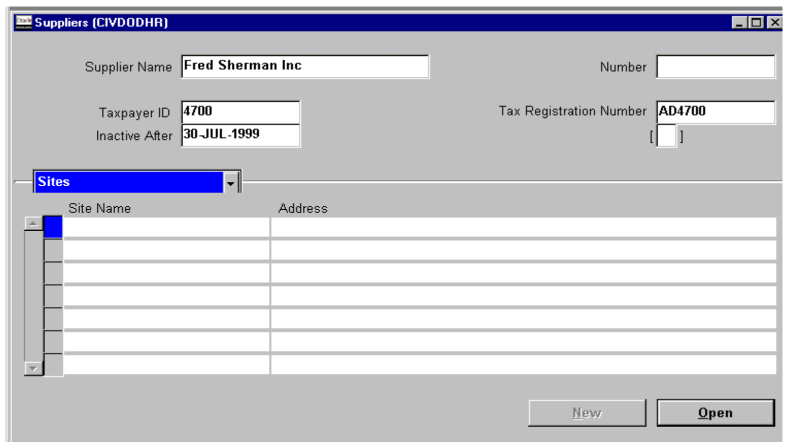
Creating a Local Supplier for a Local Activity, Continued

Completing the Suppliers Window (continued)

Step	Action
4	Once you complete the **Payment Region**, the lower half of the **Suppliers** Window displays with a new ***Site Name*** and ***Address*** data fields. The **<New>** Taskflow Button is inactive at this time. The top region is populated from the previous window. 
5	Click **<<u>O</u>pen>**. The **Supplier Sites** Window displays. **Note:** You may list several different sites for a supplier (e.g., Northwest Region, Southeastern Region). However, the DD Form 1556 will only pick up the first site address. It is recommended that separate suppliers be set up for each address; e.g., Oracle Northwest Region, separate supplier as Oracle Southeastern Region, etc.

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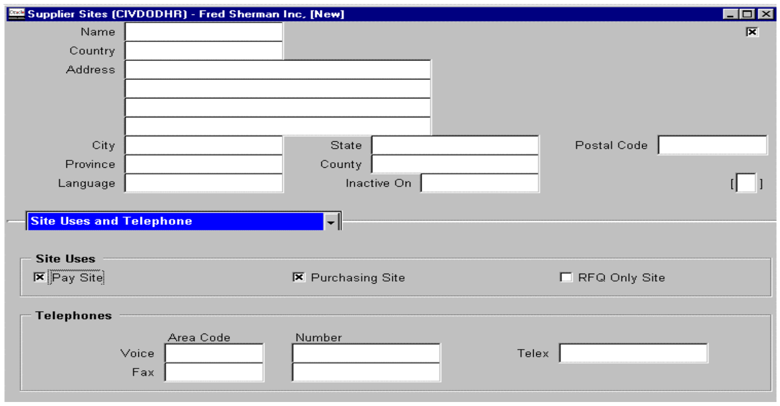
Creating a Local Supplier for a Local Activity, Continued

Completing the Supplier Sites Window

Step	Action
1	The **Supplier Sites** Window displays with the vendor name on the Titlebar and the drop down menu displays *Site Uses and Telephone*. Place your cursor in the ***Name*** data field to enter the following:

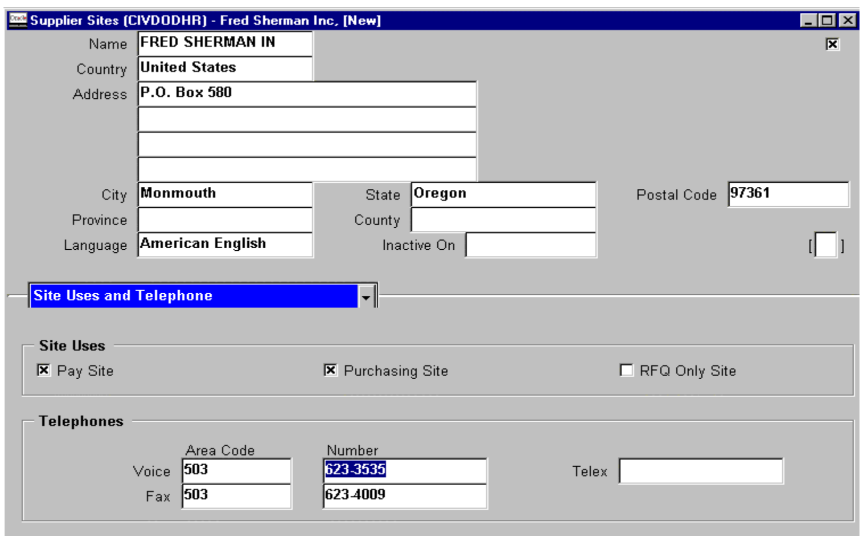


Data Field/Region	Description/Action
Name	Type in **name of the site** (location where training is to be conducted) (15-character limit).
Country	Click the LOV or type in.
Address	Type in street address of vendor.
State	Type in state address of vendor.
Postal Code	Type in zip code of vendor address.
Language	Click in field – populates with the default to American English (language in which the course is taught).
Inactive On	Type in date the vendor becomes inactive, if appropriate.
Global DDF	Flexfield is not customized for DoD.

Continued on next page

Creating a Local Supplier for a Local Activity, Continued

Completing the Supplier Sites Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1 (cont)</td><td></td></tr>
<tr><td></td><td>
<table>
<tr><th>Data Field</th><th>Action</th></tr>
<tr><td>Site Uses Region</td><td>Checkboxes not required.</td></tr>
<tr><td>Telephones Region</td><td>Type in Voice or Fax information to include area code.</td></tr>
</table>
</td></tr>
<tr><td>2</td><td>Click Save on the Toolbar. Exit the window.
Example:

</td></tr>
</table>

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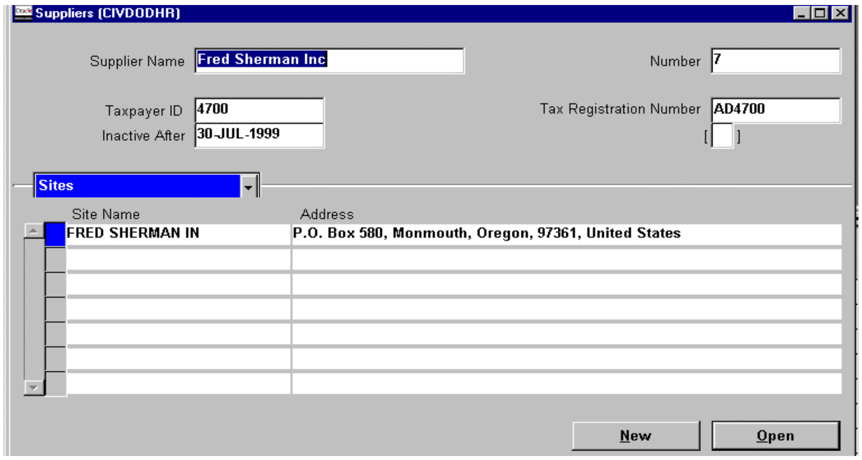
Creating a Local Supplier for a Local Activity, Continued

Completing the Supplier Sites Window (continued)

Step	Action
3	The **Suppliers** Window displays. The lower portion is populated with the vendor information. 
4	Click <**New**> or <**Open**> to create/display another local vendor.

Defining an Activity

Purpose

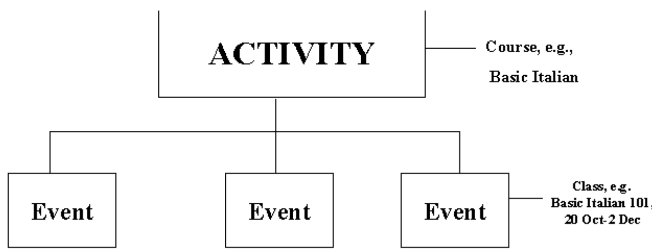
This section guides you through the steps to set up an Activity (course) which is usually the first action taken after a **Training Request Form** is completed or received, and before an employee can be enrolled in training.

Definitions

Activity - defines the courses listed in the DoD Central Course Catalog as well as what a local supplier (vendor) can offer. Local courses can be built for Local Activities. An Activity can be any of the following:

- A training course conducted internally or bought from an external supplier, regardless of method; e.g., classroom, CBI, correspondence, seminar.
- On-the-job training and apprenticeships.
- Work experience and cross-training.
- Educational Activity (college/university courses).

Activity Type – one of the nine OPM training course code types expanded to include functional areas within DoD; e.g., Acquisition, as described in this Module overview.



See Also

Module 7, Employee Training and Development:
    Overview
        Section: Course Training Type Codes
    Chapter 1, Requesting Training
        Section: Completing the Training Request Form
    Chapter 3, Managing Enrollments, Cancellations, and Attendance
        Section: Enrolling an Employee

Continued on next page

Defining an Activity, Continued

Who Does This

Components will determine who will be given this responsibility.

Before You Begin

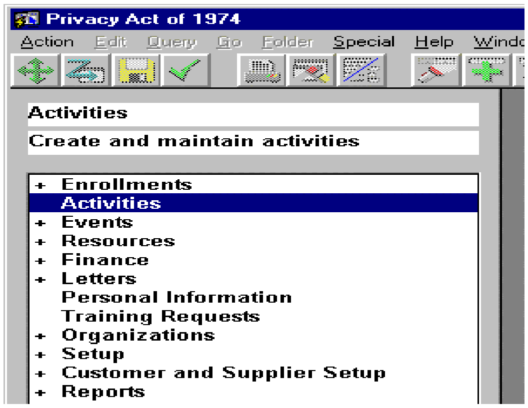
- You must accomplish these actions in the following sequence before an employee can be nominated or scheduled for training:
  - Build a Local Supplier, if needed.
  - Define an Activity, if needed.
  - Schedule an Event.
  - Schedule sessions, if more than one (not required).
  - 5. Enroll an employee.
- Once an Activity is defined, it does not have to be rebuilt for each subsequent event. **As long as the Activity is not end dated**, you can skip directly to Scheduling an Event.
- You must identify a new supplier (if not in the DoD Course Catalog) before an Activity (course) can be built.
- You can have multiple Activities of the same type with different validity dates. If you want to run concurrent versions of an Activity, use dates to control when the Activity can be scheduled.
- You cannot run Events for the Activity earlier than the start date or later than the end date.

Continued on next page

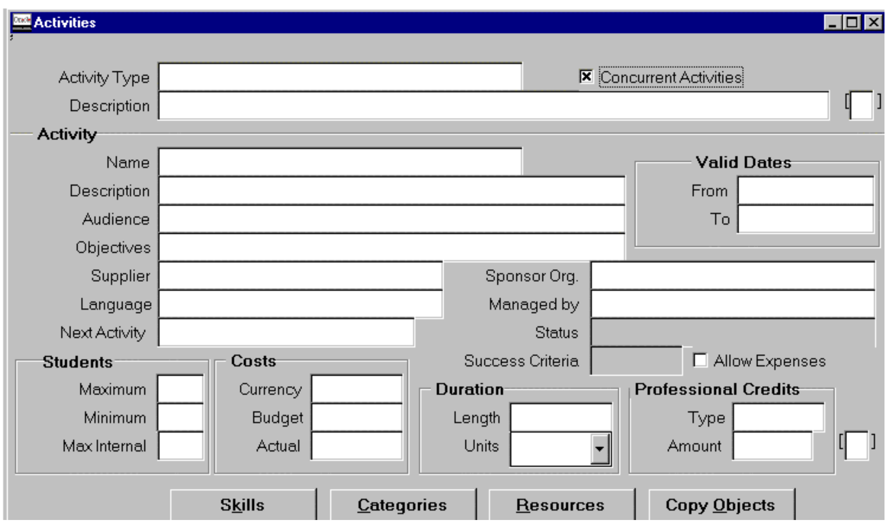
Defining an Activity, Continued

Completing the Activities Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Navigation List → Activities → <Open>.



</td></tr>
<tr><td>2</td><td>The Activities Window displays. With your cursor in the Activity Type data field, click F8 on your keyboard to bring up first type or run a query for a specific type you need; e.g., press F7, type 5%, press F8. If there is more than one entry for that query; e.g., 5D, 5N, use the arrow down key to move to the next activity.



</td></tr>
</table>

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Defining an Activity, Continued

Completing the Activities Window (continued)

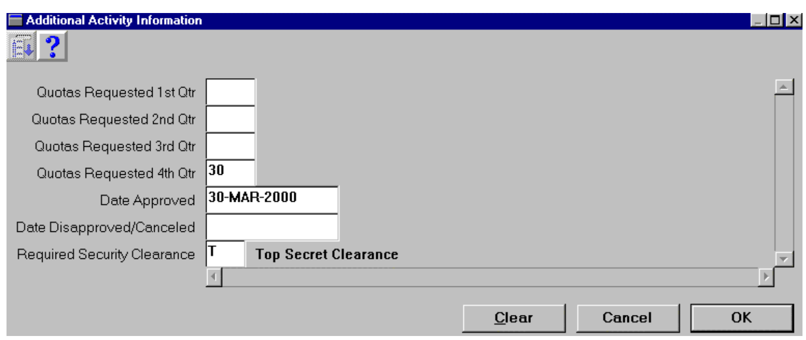
Step	Action
3	The ***Activity Type*** and ***Description*** display the nine expanded OPM Training Course Code Types and expanded functional codes for a total of 21 selection codes. These codes should not be altered. **Caution:** Use the [**Tab**] key to proceed to each data field; the up/down keys will move you to a new Activity Window. If you inadvertently use the arrow keys and a new Activity Window displays, click **Go** on the Toolbar and select **Previous Record** to return to your working window.
4	The **Concurrent Activities Checkbox** is selected to set up multiple activities of the same type with different validity dates. For example, you may have an activity that is delivered as both a day course and as an evening course.
5	Click the DDF to open the **Additional Activity Information** Window.

Continued on next page

Defining an Activity, Continued

Completing the Additional Activity Information

Step	Action	
1	With your cursor in the first data field, complete the following:	
	Data Field	**Description/Action**
	Quotas Requested 1st Qtr	Type in number.
	Quotas Requested 2nd Qtr	Type in number.
	Quotas Requested 3rd Qtr	Type in number.
	Quotas Requested 4th Qtr	Type in number.
	Date Approved	Type in date.
	Date Disapproved/Canceled	Type in date, if disapproved.
	Required Security Clearance	Click the LOV to make a selection for the Security Clearance for the Activity.
2	Click **<OK>** on the **Additional Activity Information** Window once you have completed the data fields. **Example:**	

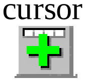


3	The populated **Activities** Window displays. Click Save on the Toolbar.	

Continued on next page

Defining an Activity, Continued

Entering a New Activity Window

Step	Action
1	With your cursor in the ***Name*** data field, scroll through the course Names using the Page Down or Page Up keys to locate the one that matches the TRF from your Civilian Inbox or which you plan to define. If you do not find a match to the Activity you wish to locate, you may begin to define an Activity.
2	To enter a new activity name (local course), select the activity type (e.g., Orientation, Acquisition, Executive) that most closely relates to the new course. With your cursor in the activity name field, select the New Record Button  on the Toolbar. This will clear the last record and allow you to input information for the new course.
3	Complete the remainder of the Activity Region:

Fields, Buttons, and Checkboxes	Description/Action
Activity Region:	
Description	Auto-populates from the DoD Course Catalog. Type in if a new course.
Audience	Auto-populates – describes who is eligible, if available. Type in, if a new course.
Objectives	Auto-populates learning objectives, if available. Type in, if a new course.
Supplier	Click the LOV.
Language	Click the LOV.
Next Activity	Used to identify the successor activity after the current activity has been end dated.
Sponsor Org.	Populates with your organization but you can override by clicking the LOV and selecting another one.

Continued on next page

Defining an Activity, Continued

Entering a New Activity Window (continued)

Step	Action
3 (cont)	*(nested table below)*

Fields, Buttons, and Checkboxes	Description/Action
Activity Region:	
Managed by	Click the LOV to select the responsible manager's name or registrars.
Status	Grayed out.
Success Criteria	Grayed out.
Allow Expenses Checkboxes	Not customized for DoD use.
Valid Dates Region	Automatically displays the start (***From***) date when the activity is built. The (***To***) date is entered when the activity is ended. End dating should be used sparingly as activities can be reused indefinitely.
Students Region:	
Maximum	Type in number of students.
Minimum	Type in number of students.
Max Internal	Type in number of students.
Costs Region:	
Currency	Defaults to USD.
Budget	Type in total projected course cost (optional).
Actual	Leave blank while building the Activity; input when known.

Continued on next page

Defining an Activity, Continued

Entering a New Activity Window (continued)

Step	Action
3 (cont)	(nested table below)

Fields, Buttons, and Checkboxes	Description/Action
Duration Region:	
Length	Input number to match unit; e.g., 1 (week).
Units	Select from drop down menu. Defaults to hours.
Professional Credits Region	Click the LOV or add additional choices using Local Codes.
Taskflow Buttons:	For local use:
<Skills>	Will be used to enter information about the skills the activity is expected to provide; does not flow to CMIS. This information will be updated through the Look up Codes on the **Navigation List**.
<Categories>	Used locally to group activities into three types – program, classification, package (e.g., acquisition, VRA). This information will be updated through the Look up Codes on the **Navigation List**.
<Resources>	Used to specify resources required or useful to run the event for the activity; e.g., classroom equipment, trainer, venue. This information will be updated through the Look up Codes on the **Navigation List**.

Continued on next page

Defining an Activity, Continued

Entering a New Activity Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3
(cont)</td><td>
<table>
<tr><th>Fields, Buttons, and Checkboxes</th><th>Description/Action</th></tr>
<tr><td><Copy Objects></td><td>Opens to show <i>Copy From</i> data field (with the activity auto-populated), <i>New Activity</i> data field, and four checkboxes (Categories, Resource Usages, Price List entries, Skills), and a <Copy> Taskflow Button.</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Click Save on the Toolbar.</td></tr>
</table>

Scheduling an Event

Purpose

This procedure will guide you through the steps to schedule an Event which is the third action taken after a **TRF** is completed or received in the **Civilian Inbox**, and before an employee can be enrolled in training.

Definitions

Event - a specific instance of an Activity (course) scheduled to run on given dates, or a one-time **Event**, which is not related to an Activity. An Event can run any period of time you choose; e.g., several hours, days, or weeks.

Session - a unit of time within an **Event** for which you can independently book resources.

◆ **Example:** To help you create a detailed agenda for an **Event**, you can break it down into shorter sessions, specifying the location with start and end times of each session. You might divide a one-day Event into four two-hour sessions.

In This Section

The following topics are covered in this section:

- Completing the **Scheduled Event** Window.
- Completing the **Additional Event Information** Window.
- Copying an Event.
- Changing the Event Status or Maximum Attendees.
- Restricting an Event.

Who Does This

Components will determine who has this responsibility.

See Also

Module 7, Employee Training and Development Using the Modern DCPDS
  Chapter 1, Requesting Training
    Section: Completing the Training Request Form
  Chapter 2, Administering Training
    Section: Defining an Activity
  Chapter 7, Setting Up Local Codes

Continued on next page

Scheduling an Event, Continued

Before You Begin

- When you are ready to run an **Activity** (course), you create a scheduled **Event** for which you can book resources and enroll students.
  - An **Event** may run for any period of time you choose, that is several hours, days, or weeks.
  - There is no limit on the number of **Events** you can schedule for an Activity.
- If the Training Center location you need is not included, you can add it by following the instructions in Setting up Local Codes.
- You can also:
  - Break down an **Event** into sessions. Sessions are discrete topics or time slots within an **Event**. You must enter the times using military format to include colons; e.g., 08:00.
  - Restrict an **Event** to internal employees or customers.
  - View or enter categories for the **Event.**

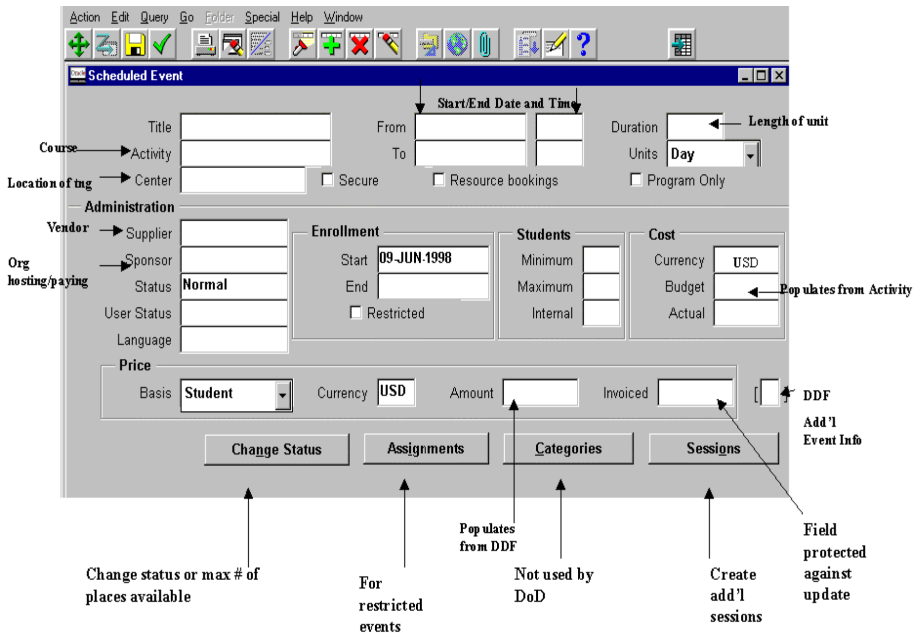
  Example: You may run the **Event** *"Using the Modern DCPDS"* over a two week period setting up a session for each day in the two weeks. The first session on Day 1 might be "*Introducing the Modern DCPDS";* the second session on Day 2 might be "*Getting Started,*" through the 10th day of the Activity (course).
- You can book resources, such as venues (locations) and trainers, for the whole **Event** or for individual sessions. Expand your Resources LOV by following Chapter 7, Setting up Local Codes.

Continued on next page

Scheduling an Event, Continued

How To Access the Scheduled Event Window

From the **Navigation List** → *Events* → *Scheduled* → <**Open**>.



Taskflow Button	Description/Action
<Change Status>	To change the status of an **Event** by: • Closing or • Canceling or • Changing to Placed, Full, or others you may establish using Quick Codes.
<Assignments>	See procedure, Restricting an Event, in this chapter.
<Categories>	To group activities into three types.
<Sessions>	To create additional sessions.

Continued on next page

Scheduling an Event, Continued

Completing the Scheduled Event Window

Step	Action
1	Place your cursor in the ***Title*** data field and complete the following:

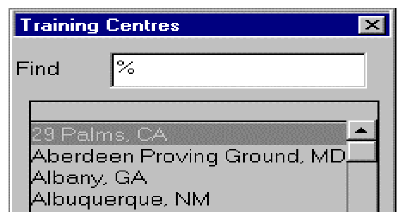
Data Field	Description/Action
Title	Type in a title (80 characters or less) to identify the **Event**; e.g., Supervisory Training 1999-1. If you leave the title field blank, you will get a system-generated number, which is difficult to use to identify the **Event** later when you try to query. The title you enter or the system-generated number displays in a column on the **Enrollment Details** Window. **Note:** Components or local installations should determine how this title will be used. For example, you may want to include a location, start date, or component unique number; e.g., NWRegion. **Caution:** If you are trying to query on a title, be sure you have clicked F7 or enter query. Otherwise, the system will think you are establishing a new title that will result in a title that looks like %Admin%. If you realize you have not set up a query, click the clear record button on the Toolbar and start over.
Activity	Click the LOV to select the **Activity**. This title appears in the employee record. Certain information such as Status and Language auto-populates from the **Activity** Window, but you can override it.

Continued on next page

Scheduling an Event, Continued

Completing the Scheduled Event Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1
(cont)</td><td>
<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Center</td><td>Click the LOV or type the first few letters to select the Training Center location of the Activity.

Example:

</td></tr>
<tr><td>Secure Checkbox</td><td>Click the appropriate organization as the sponsoring or administering organization.</td></tr>
<tr><td>From</td><td>Type the start date. The time of day is optional.
Note: You cannot backdate an Event.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Scheduling an Event, Continued

Completing the Scheduled Event Window (continued)

Step	Data Field	Description/Action
1 (cont)	**To**	Type the end date with the time of day in the next field. **Example**: Use the time format of 14:00 for 2 PM if you want to create sessions. **Notes:** • Leave start and end dates blank if you want to create an **Event** with the Status of “Planned”; if you do not enter dates, the Event cannot have the status of “Normal.” • Leave the time of day blank if you are not creating sessions. Also, ensure the times you enter start on (or before) and finish on (or after) the earliest and latest session times
	Resource bookings Checkbox	Select the checkbox if you have booked resources for an **Event**.
	Duration	Type in length of unit; e.g., 40 if your units = hours. The system defaults to hours.
	Units	Defaults to hours but you can override it.
	Program Only Checkbox	Select to make the **Event** part of a program.
	Supplier	Select Supplier from LOV.
	Sponsor	Select Sponsor from LOV.

Continued on next page

Scheduling an Event, Continued

Completing the Scheduled Event Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1
(cont)</td><td>
<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Status</td><td>Protected field.

Note: Event status controls the type of enrollments you can enter for the Event.</td></tr>
<tr><td>User Status</td><td>Defaults to Normal.</td></tr>
<tr><td>Language</td><td>Click the LOV to select a language.</td></tr>
<tr><td>Start/End</td><td>Defaults to class start and end date. Override with the dates you need enrollments to start and end.</td></tr>
<tr><td>Restricted Checkbox</td><td>Select if you want to restrict enrollments to internal students with certain assignments, or to restrict enrollments to external students from selected customers; otherwise, leave the box unchecked to open the Event to any customer or external student.</td></tr>
<tr><td>Students Region:</td><td></td></tr>
<tr><td>Minimum/ Maximum/</td><td>Input the minimum and maximum number of students. OTA automatically sets the Event status to “Full” when the maximum is reached when you complete the Event Status Change Window.</td></tr>
<tr><td>Internal</td><td>Optional field. Use to limit the number who can attend from one organization on the same date.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Scheduling an Event, Continued

Completing the Scheduled Event Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1
(cont)</td><td>
<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Cost Region:</td><td></td></tr>
<tr><td>Currency</td><td>Click the LOV to select currency used. You must have USD in the Currency data field in order to enter a dollar amount in the Amount data field.</td></tr>
<tr><td>Budget</td><td>Auto-populates amount from Activity Window.</td></tr>
<tr><td>Actual</td><td>Defaults to “0”.</td></tr>
<tr><td>Price Region</td><td></td></tr>
<tr><td>Basis</td><td>Defaults to no charge.</td></tr>
<tr><td>Currency</td><td>Type in USD.</td></tr>
<tr><td>Amount</td><td></td></tr>
<tr><td>Invoiced</td><td>Leave blank; field protected against update.</td></tr>
<tr><td>DDF</td><td>Click to open the Additional Event Information Window.</td></tr>
</table>
</td></tr>
<tr><td>2</td><td>Additional Event Information Window displays. See steps to complete in the next procedure.</td></tr>
</table>

Continued on next page

Scheduling an Event, Continued

Completing the Additional Event Information Window

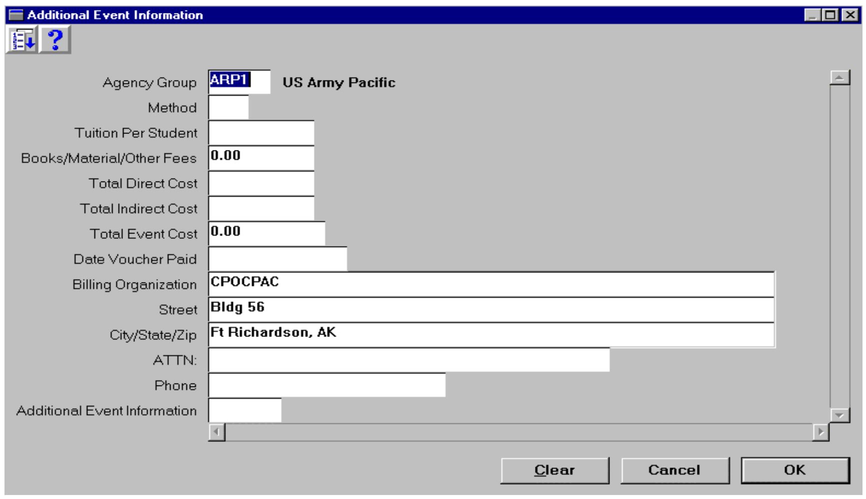
Step	Action
1	With your cursor in the first field, complete the following:

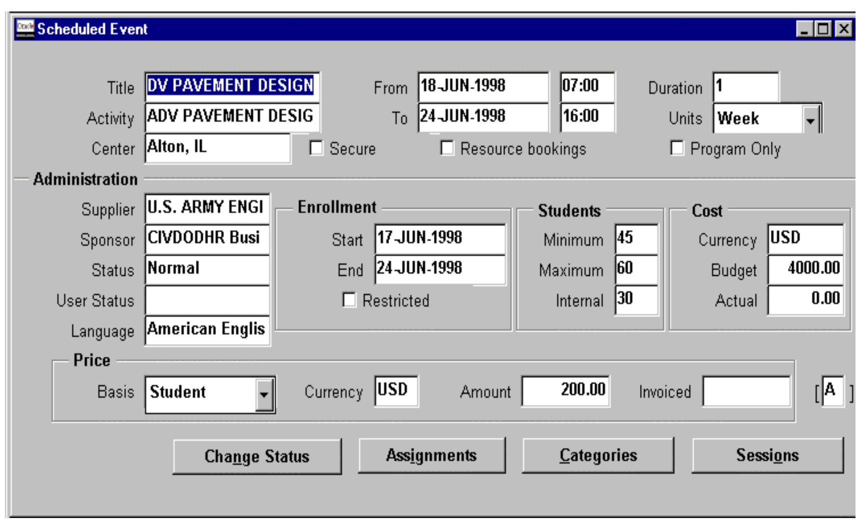
Data Field	Description/Action
Agency Group	Click the LOV.
Method	Click the LOV.
Tuition Per Student	Type in the dollar amount.
Books/Material/ Other Fees	Type in cost, if known.
Total Direct Cost	Type in sum of tuition from **Activity** and sum from Book/Material/Other fees from previous data field.
Total Indirect Cost	Leave blank. Once you save the DDF and open again, the total displays.
Total Event Cost	Leave blank. Once you save the DDF and open again, the total displays.
Date Voucher Paid	Type in date.
Billing Organization	Type in name of organization that will pay invoice.
Street	Type in street address of billing organization.
City/State/Zip	Type in the city, state, and zip code.
ATTN:	Type in name of person in billing organization.
Phone	Type in phone number of billing organization.
Additional Event Information	Used by WHS.

Continued on next page

Scheduling an Event, Continued

Completing the Additional Event Information Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Click <OK> and click Save.
◆ Example:


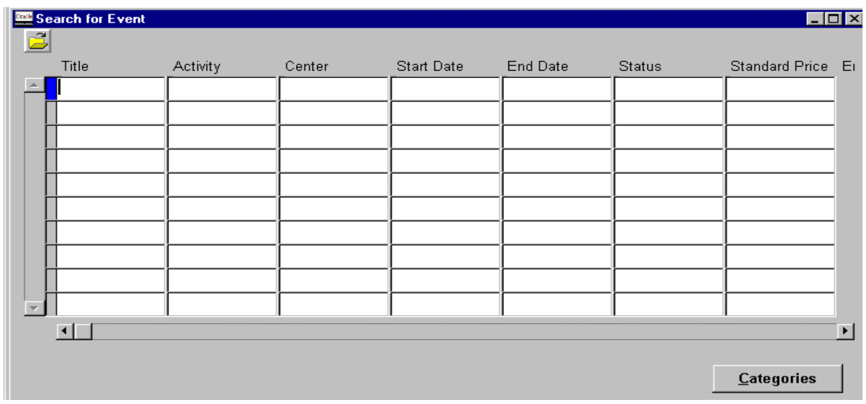
</td></tr>
<tr><td>3</td><td>The Scheduled Event Window displays with the data populated. Click Save  on the Toolbar.
Example:


</td></tr>
</table>

Querying for an Event

Querying for an Event

In addition to the Querying methods you learned in the Fundamentals Module, OTA has a unique querying feature with the **Find Events** Window that allows you to specify the Type of Event by Activity, Center, or Status. Use the following steps to query for an Event.

Step	Action
1	On the **Navigation List** → *Events* → *Events Search* → **<Open>**.
2	The **Search for Event** Window displays. Query for the Event by clicking F7/F8 and using the *Current Record Indicator* to find the Event you want. Or Click F7, place the cursor in the Title or Activity block, type a portion of the name (e.g., %Man%) and click F8. 

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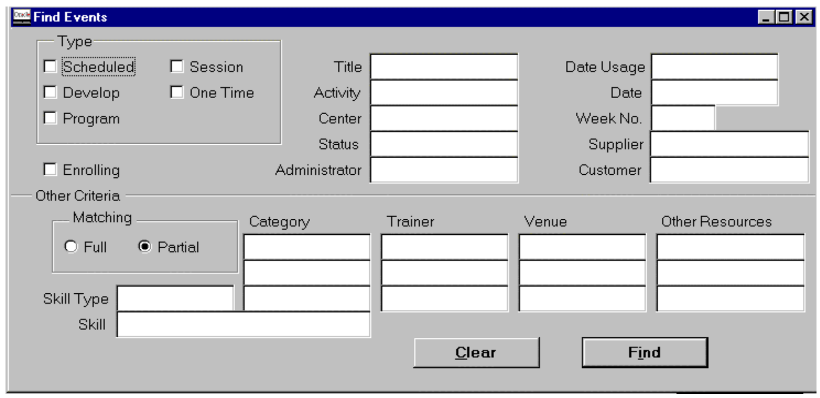
Querying for an Event, Continued

Querying for an Event (continued)

Step	Action
2 (cont)	*Or* On the **Search for Event** Window, click **Query** on the Main Menu Bar and click **Find**. The **Find Events** Window displays. Select the appropriate checkboxes or use the LOVs to customize the search for the Event you need. 
3	Click **<Find>**. The **Search for Event** Window displays with the selected Event(s) populated.
4	Select the Event you need and continue your action.

Copying an Event

Copying an Event

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>With the Scheduled Event Window open you need to copy, click the New Record button on the toolbar .</td></tr>
<tr><td>2</td><td>A new Scheduled Event Window displays.
With your cursor on each data field you want to duplicate from the previous Event, click the F3 key at the top of your keyboard.

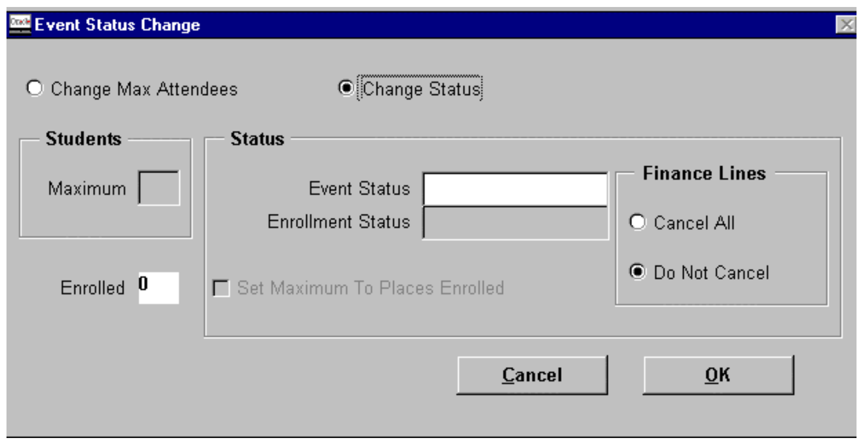
Note: New data must be entered in the DDF, as it will not copy.
<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Title</td><td>Will be blank; type in a unique title that you will be able to identify later.</td></tr>
<tr><td>Activity</td><td>Press F3 on the keyboard to populate.</td></tr>
<tr><td>Center</td><td>Press F3 to populate.</td></tr>
<tr><td>From and To</td><td>If you do not plan to use the dates from the original Event, input new dates and hours.</td></tr>
<tr><td>Duration</td><td>Click F3 to populate.</td></tr>
<tr><td>Units</td><td>Defaults to day when you press F3; you can override.</td></tr>
<tr><td>Status</td><td>Defaults to Normal as you are creating a new record.</td></tr>
<tr><td>Enrollment Region</td><td>Defaults to today’s date; type in the dates needed.</td></tr>
<tr><td>Price Region</td><td>Defaults to Student; select from the drop-down menu.</td></tr>
</table></td></tr>
<tr><td>3</td><td>Click Save on the Toolbar once you have completed all fields and proceed with your action on the Event.</td></tr>
</table>

Changing the Event Status

Changing the Event Status

Once you have scheduled an **Event**, you might need to make changes at a later time. The types of changes might include maximum number of students or status of the **Event**. Changing Max Attendees is discussed in Chapter 3, Changing Maximum Attendees. Follow these steps to change the status of the scheduled **Event**:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click <Change Status> on the Scheduled Event Window.</td></tr>
<tr><td>2</td><td>The Event Status Change Window displays.



There are two buttons at the top of the window.
Change Max Attendees
Change Status

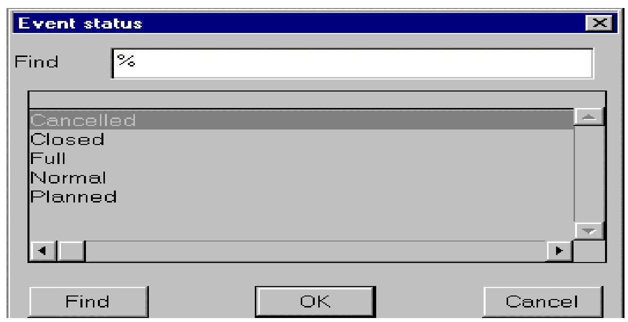
The Students Region has a Maximum field, which can be changed by increasing or decreasing the number.
The Status Region has the Event Status data field and the Enrollment Status data field with a checkbox for Set Maximum to Places Enrolled. If the Event is Full, you can prevent any new enrollments by changing the Event status to “Closed.” This automatically cancels any enrollments with the status “Requested” as those enrollments have not been confirmed or approved.

The Finance Lines Region is not currently used by DoD.</td></tr>
</table>

Continued on next page

Changing the Event Status, Continued

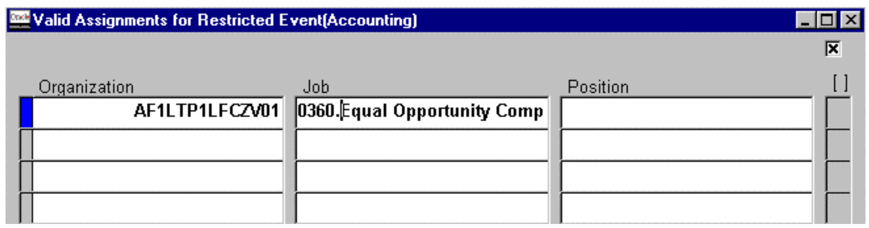
Changing the Event Status (continued)

Step	Action
3	Select the Change Status radio button. **Notes**: If the Secure box is selected on the **Enrollment Summary** Window, you can update the Event if you are assigned to the organization that is administering the Event.
4	With the cursor in the *Event Status* data field, click the LOV. 
5	Click “Cancelled” and click **<OK>**.
6	The *Enrollment Status* data field now opens, with your cursor in it, click the LOV.
7	Click “Cancelled.” Click <**OK**>. A Caution Box displays and states “All Enrollments will be Cancelled.” Click **<OK>**. **Note:** When you select “Cancelled” or “Planned” from the Event Status LOV, the ***Enrollment Status*** data field on the **Event Status Change** Window opens, with other choices.
8	To check the changes you made, re-query the Event and check the ***Status*** data field to see if the new status is reflected. **Note**: “Waitlisted” can be added to the LOV. See Chapter 7, Setting Up Local Codes for additional information.

Restricting an Event

Restricting an Event

You can Restrict an Event to a specific organization, job title, or position, on the **Scheduled Event** Window.

Step	Action
1	On the **Scheduled Event** Window, select the *Restricted* checkbox (under the Enrollment Region) and click **<Assignments>**.
2	The **Valid Assignments for Restricted Event** Window displays with the Event in parenthesis on the window title. Click the LOV to populate *Organization* and *Job* columns. Click Save on the Toolbar. ◆ **Example**: 
3	Exit the window. **Note:** Future enrollments will allow you to enroll only those personnel you specified by Organization and Job series/title.

Creating a One-Time Event

Purpose

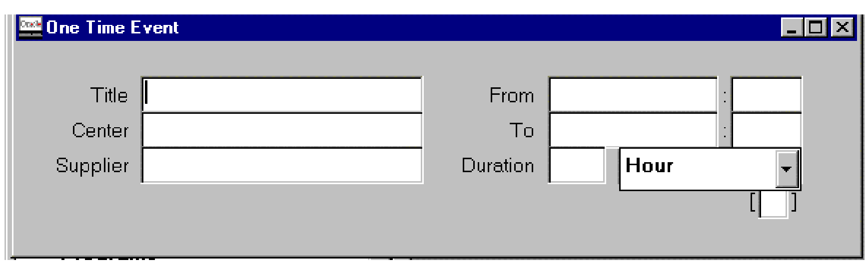
This procedure guides you through the steps to Create a One-Time Event when it is more appropriate than creating a Scheduled Event.

Before You Begin

- You can Create a One-Time Event for Events that are normally less than eight hours, do not require an Evaluation, and are mandated to be recorded in the employee's record. Examples would be training on Ethics, HIV, or computer security, which usually involves scheduling the entire workforce.
- The **One Time Event** Window is designed for rapid entry of minimum event information to support student enrollments. It does not support the full features of the **Scheduled Events** Window.
- You would create a Scheduled Event if you want to teach the Event at dates and times scheduled, for numerous times, and normally, without an end date.

Creating a One-Time Event

Follow the steps below to create a One-Time Event.

Step	Action
1	On the **Navigation List** → *Events* → *One-Time* → **<Open>**.
2	The **One Time Event** Window displays. With your cursor in the ***Title***, complete the following data fields: 

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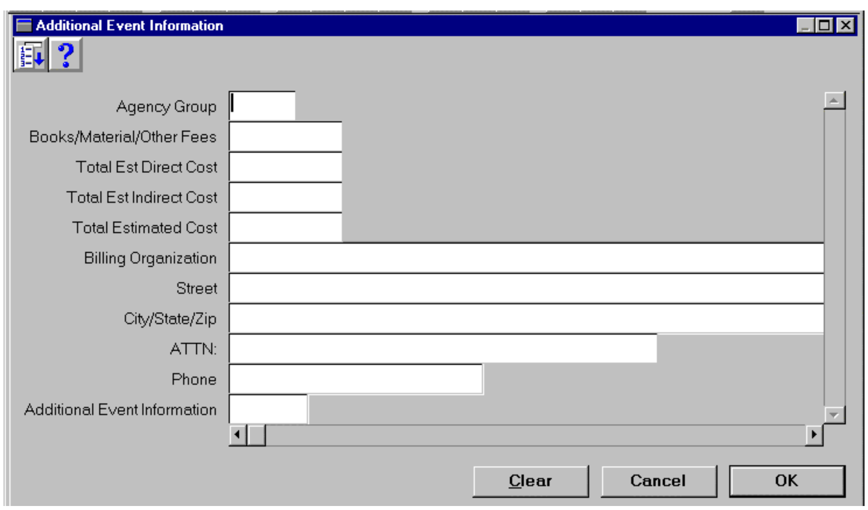
Creating a One-Time Event, Continued

Creating a One-Time Event (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2
(cont)</td><td>
<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Title</td><td>Type in the Event title.</td></tr>
<tr><td>Center</td><td>Click the LOV to make the selection.</td></tr>
<tr><td>Supplier</td><td>Click the LOV to make the selection.</td></tr>
<tr><td>From</td><td>Click the LOV to use the calendar.</td></tr>
<tr><td>To</td><td>Click the LOV to use the calendar.</td></tr>
<tr><td>Duration</td><td>Type in the number.</td></tr>
<tr><td>Hour</td><td>Click on the drop-down menu to select hours, days, week, etc.</td></tr>
<tr><td>DDF</td><td>Click the DDF to open the Additional Event Information Window.</td></tr>
</table>
</td></tr>
<tr><td>3</td><td>The Additional Event Information Window and its data fields are described in the procedure on Scheduling an Event in this chapter. Complete the window and click <OK>.



</td></tr>
</table>

Continued on next page

Creating a One-Time Event, Continued

Creating a One-Time Event (continued)

Step	Action
4	Save your action. Follow the procedure, Enrolling an Employee, in Chapter 3, to continue your action.
5	See Chapter 6, Reports, One-Time Event Update HR, to set up training completions in Oracle HR.

Using the Bulletin Board

Purpose

This procedure guides you through the steps to initiate surveys, advertise training events, and post instructions for students on the Bulletin Board.

See Also

Module 7, Employee Training and Development Using the Modern DCPDS

- Overview
- Chapter 1, Requesting Training
  - Section: Completing the Training Request Form
- Chapter 3, Managing Enrollments, Cancellations, and Attendance
  - Section: Enrolling an Employee

Who Has Access

Components will determine who will be given access to the Bulletin Board to post Events and surveys.

Before You Begin

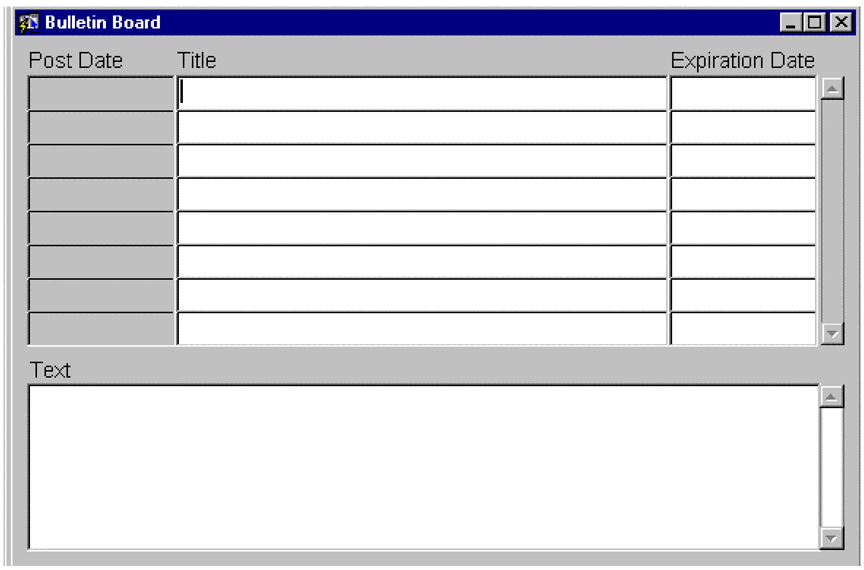
- The Bulletin Board will be the primary means of announcing annual and special surveys, advertising events for all or selected personnel, announcing event changes and cancellations, and to provide special reporting instructions for students.
- All personnel may be assigned access to **view** the Bulletin Board.

Continued on next page

Using the Bulletin Board, Continued

Using the Bulletin Board

Step	Action
1	On the **Navigation List** → *Bulletin Board* → **<Open>**.
2	The **Bulletin Board** Window displays with three columns and a Text Box.



The data fields are described below.

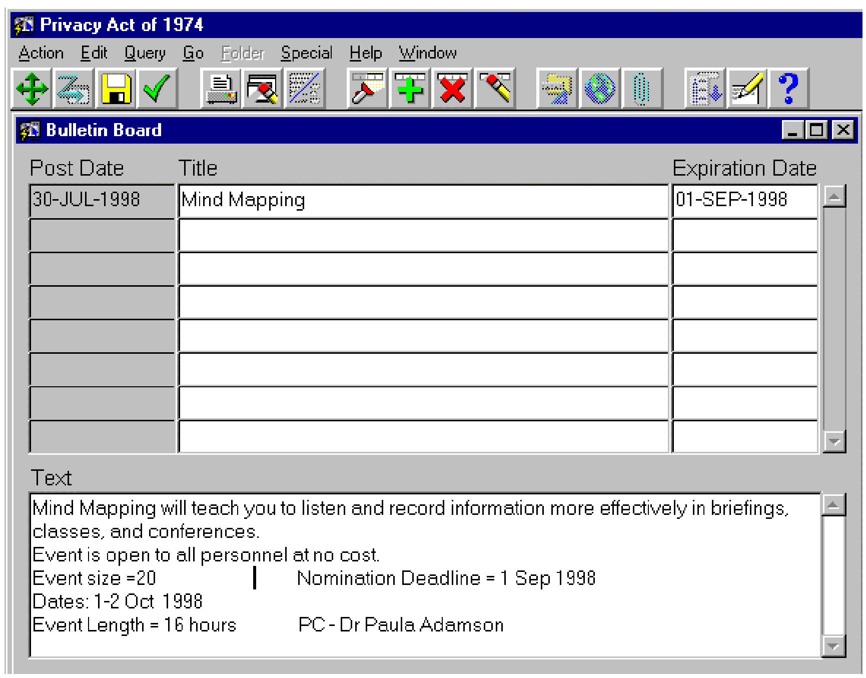
Data Fields	Description/Action
Post Date	Date the message was posted to the Bulletin Board.
Title	The subject assigned to a message.
Expiration Date	Date the message will be removed.
Text Box	Provides spaces for additional information such as course description, length, size, dates, point of contact, or nomination deadline with 2000 characters available.

Continued on next page

Using the Bulletin Board, Continued

Using the Bulletin Board (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>With your cursor in the Title data field, type the title of your course or message.</td></tr>
<tr><td>4</td><td>With your cursor in the <i>Expiration Date</i> data field, click the LOV and select a date. Click <OK>. The date populates the field.</td></tr>
<tr><td>5</td><td>With your cursor in the Text box, type your message.
Note: You can input up to 2000 characters.</td></tr>
<tr><td>6</td><td>Click Save on the Toolbar. The Post Date populates with today's date.
Example:



</td></tr>
<tr><td>7</td><td>Exit the window.</td></tr>
</table>